

The Five Steps to Manage the Writing Process Webinar

Date?

Moderator/Jodi: Welcome to the Virtual Training Center. This is Joan Strohauer with Statewide Learning and Performance Management. Our presentation today will be “The Five Steps to Effective Writing: Do You Have the Power?” Our presenter is Ann Wilson, Supervisor of Publication Business Services at the Franchise Tax Board.

Before we begin, we have a few tips on using Live Meeting that will make the session more interactive. If you look at the top, right-hand corner of your screen, there are four buttons I want to call your attention to. First, is a small, green button and if you will click on the drop down menu, you will see how to give us feedback. For example, red means need help, blue – can’t hear, yellow – slow down and so forth. The second button that looks like three white pages is for handouts. You will find copies of the slides, as well as other handouts that you can download after the session if you don’t have them already. Third, is a small microphone, which you can use to mute and unmute and we ask that during this session you stay on mute. And the fourth, and most important question is the Question and Answer. If you have a question, please go to Q & A and write in your question. And sometimes it helps if you give your department. If you have any difficulty hearing, please first check the speakers on your computer. If you still cannot hear, would you

please contact your IT Department? And just a reminder, the session is being recorded.

So, let me introduce Ann. Ann Wilson oversees the design development and production of FTB's forms and publications. She has a Bachelor of Arts degree in child development from California State University of Sacramento, but chose a career in civil service rather than a classroom. However, that hasn't prevented Ann from sharing her passion to teach. She had more than 22 years of government experience in every job and found a way to train and educate employees or the public about programs and services the State of California offers. So, let me with that turn it over to Ann.

Presenter/Ann: Good morning everyone. Sounds like an old typewriter is out there. Today's session is on the "Five Steps to Manage the Writing Process: Do You Have the Power?" Today's webinar is about writing and how to get your thoughts and ideas into a powerful form of written communication. Our objective today is to unleash your power and apply five basic writing steps. You will go from a blank page or often a blank stare to a finished product. To unleash your power, we're going to go over the five steps. Step 1 is to plan. Step 2 is to organize. Step 3 is to write. Step 4 is to include elements in your paper. Step 5 is to review. You'll notice that the initial letter of each one it spells out power. Writing, for some of us, that word causes anxiety. Your boss approaches you and asks you

to write a recommendation, a proposal or an issued paper. You sink in your chair. Your blood pressure increases. Your palms begin to sweat and you forgot that your boss was even speaking to you just because you heard the word “write” Personally, I love this challenge, but must agree that you have to have a passion to write to enjoy writing. But we can overcome this fear and at least tackle the assignment with confidence when we follow a writing process. So, let’s start out by polling you.

Moderator/Joan: Can everybody please put your microphone on mute. We can hear background sound, so please be sure you are muted.

Presenter/Ann: For those of you out there, do you like to write? Please answer, yes, it comes naturally; sometimes when I can borrow copy; No, it’s a painful process; Never, I’d rather eat cat hair. I thought I’d add a little humor to my slide.

So, looking at the poll it looks like 42% of you like to write. So, that’s a good thing. 34% of you sometime;, it really depends on your mood possibly. If somebody has already done something out there where you can look at some samples or some templates; and 21% of you are telling me it’s a painful process, but you wouldn’t want to eat cat hair. But there are five of you out there that would, so that’s quite interesting. Okay, Joan you can turn to the next slide.

NEXT SLIDE

Why you should write effectively? Two thirds of state jobs require some type of writing. You probably have experienced that yourself. \$3.1 billion is spent annually on training. Writing is a "threshold skill" for employee selection and promotion. So, this means people who write are going to get the job and get promoted over someone who doesn't really have those skills. And 30 percent of our day -- more than two hours daily -- is spent writing. So, in government we often write proposals or issue papers to present ideas to management, to provide a recommendation for decision-making. In order to understand the complexity of a problem, as well as available solutions, management or board members must turn to that piece of written documentation. The words we choose to place on the paper often shape the decision-making process, affecting how our audience decides the issue. Sounds very powerful, huh? Too often we think of writing as a single task; something to sit down and bang out in one session. There are a few special people who can do that consistently, but they are the exceptions. For most of us, the only way to keep writing tasks from overloading our little brains is to break up the work into manageable steps. In other words, we need to view writing as a process. Whether writing for you is a walk in the park, or a swamp, taking it one piece at a time will make the journey more pleasant and productive. Good writing takes effort and practice. If you follow these five steps, my hints, and use the samples as a guide writing can be fun too. You will

learn how to turn your writing from bore to score. I promise. So, before we get into the five steps, tell me what types of projects you write today.

Our poll limits us to one answer. So, which types of projects do you most frequently write? So, in looking at this, more than half of you are writing correspondence. General correspondence could be email. It could be letters back and forth to your public, your audience, your clients, customers, internal and external. Reports could be reports, case studies, reports that have findings. You went out and did an evaluation on your work and you're providing a report to management or to the public. No one out there is writing laws or regulations? Good for you. Legislative proposals, BCP's and bill analysis-- 6% of you; 8% write policies and procedures. I do want to say right here is that all of these are quite different. And a writer's job is to tell as much as possible, as clearly and accurately as possible in as little reading as possible. Sounds simple, right? Language is both a tool and a weapon. Those who can use this gift effectively have a powerful advantage. So, we write for many reasons. It is good to identify a main objective. Too many may weaken your piece of writing by trying to achieve too many things at once. If your audience can end up feeling a little overloaded and confused if you're objective is not clear.

NEXT SLIDE

So, there are three objectives to business writing. The power to:

1. Persuade. This can be you're advocating your argument. You're debating. You're lobbying someone to select your way. You're promoting action or you're providing a plan, provide a mix of options, or proposals or issue papers.

2. The power to inform. You're raising awareness. You're educating and training people. And this is an evaluation, a report or a news release or the power to entertain. This evokes certain kinds of emotions and is often found in speeches or presentations. In order to help with the 5 step approach I'm going to use a recent example of my own writing. This writing technique is primarily used for large-sized, extensive documents, such as reports for polls, evaluations and research papers, not the typical correspondence that you are writing, unless it's evolved into a large paper. Emails, memos and letters can use this approach, but you might find it's more work than it's worth. So, I do suggest you see my webinar on Writing Effective Emails to learn more about email writing. I presented that back in June. So, I wrote a proposal for site management to change my units' workload due to the end processes. I will use this example throughout the five steps. I will go over each element throughout the presentation. While I'm doing so, think of something you are working on that you could use as your example.

NEXT SLIDE

So, here's a nice quote from James J. Kilpatrick. "Sloppy writing instantly reveals the sloppy mind." Hm, makes you ponder a little bit, huh?

Moderator/Joan: Ann, I have a wonderful question.

Presenter/Ann: Sure.

Moderator/Joan: And the question is: Is there a movement toward plain language in California State government?

Presenter/Ann: I believe so. The federal law was just passed and we use it here at Franchise Tax Board, but we do follow the federal law, but there is no state law at this point. But their movement is definitely something to jump on the bandwagon.

Moderator/Joan: Okay, great question.

Presenter/Ann: Thank you. Plain language. Plain language was introduced back, years ago, I think Governor Brown when he was the governor years ago, was it early 70's or the late 60's that he introduced plain language. Basically, government writing needs to be easy and concise for the reader. So, this quote says it all. I think it was "use your brain first to produce a quality product." I also want to disclose that writing takes time. Give yourself enough time to complete your

project. If you have two weeks, spend two hours a day and block it out on your calendar.

For each of the five steps I will quickly introduce you to the main slide with a flurry of ideas and then we will look into selected ideas in greater depth on subsequent slides. So, let's get started.

NEXT SLIDE

Step 1. That is your Plan. P stands for Plan.

Know your topic.

Identify your purpose and goals.

Know your audience.

Focus on your readers' needs.

Conduct an audience analysis.

Be a reporter and ask who, what, when, where, why, and how?

And use people as a resource.

When we go on vacation we plan, right? We determine how much money we have to spend on hotels, food, entertainment, rental car, etc... We might plan activities with the kids, such as parasailing, surfing... I want to be on a white, sandy beach somewhere. Can you tell? Or you might plan a nice dinner with your spouse. For the most part, we plan in advance, particularly the days that we are going to do this, the time we are going to spend and how much money it will cost. Why shouldn't we apply that same idea to writing?

NEXT SLIDE

So, know your topic. It is important to be well-informed about your topic and to gather information for what you are doing. This offers you some thoughts on gathering information using people as a resource, the Internet and checking facts, acknowledging copyright laws. So, know your topic.

Step 1 – Note key ideas or words you think will be important.

Step 2 – Identify what you want to do with the concept.

Step 3 – List sources you might need, like books, encyclopedia, something in the organization; possibly a person, other state agencies, search engines, Internet... there's a plethora of information on the Internet, and subject matter experts that are experts in that field.

Step 4 – Analyze and research your topic.

Step 5 – Summarize your topic.

Step 6 – Write out your opinion or approach to the topic.

Step 7 – Keep an open or critical mind as you do research.

So, let's take my example again. I want to change my business areas work flow. My topic; changing the workflow. Why do I want to change it? Customers have been complaining the process takes too long. So, using the previous slide I showed you, knowing my topic, I noted key ideas and words. So, I want to re-engineer. I want to discuss some business requirements, especially when it relates to the workflow. I've got to change up some duties of staff.

I want to provide better customer service. I want to meet the deadline, and I want to address why it takes so long. So, the concept, what do I want to do? I want to show a current workflow chart and a proposed workflow chart; maybe describe what the duties were and what the new duties will be and what the timeframes were, why it took so long and create new timeframes. The resources I will use are my co-workers, management and the customers. I can also look at BOE and EDD on their forms management and how they're doing their processes. I can go to Google and search the Internet and find out how people change workflow or business process re-engineer. And look at the history of the units; what has happened over time and possibly interview people who may have worked there before. So, I want to summarize my topic. So, in a couple of-- two to three sentences, I want to re-engineer our workload process to improve customer service and meet deadlines faster. That's an overall summary of the topic.

NEXT SLIDE

Know your purpose and goals. Answer these five questions before you begin:

Why am I writing this? I'm my example, and you could certainly consider your example, to get management finance to change the workbook process, I am writing a proposal to them. They have to make a decision on whether we should change it or not.

What do I want to achieve? I want them to approve and bless my recommendations to improve customer service, review their processing timeframe and allow staff to be more productive.

Who am I writing for? Initially, my paper is for management, but staff will read it. They want to know what they're going to be doing. And our customers, if that deadline timeframe is going to change we certainly should tell them.

What do I want people to think, feel, or do after they read it? I want them to understand. I want them to be happy. I want them to feel the benefits of the change, get excited and increase customer satisfaction.

What is the best form to write it in? Is it an article? Is it a letter? Is it a brochure? Is it a report? There are so many types of different writings/mediums out there. Mine would be a proposal or an issue paper. Know your audience. It is important to keep your audience in mind.

Ask yourself, who will read my documents? Adapt it for your reader. If you write without a specific audience in mind, the document might be far too general and vague or include way too much information.

What do you want your message to convey to your reader and what's in it for them? Focus on your reader's needs and conduct an audience analysis. Address the issues your readers want to solve and they will read your paper. Emphasize their interests, not your own.

NEXT SLIDE

Conduct an audience analysis. So, in an audience analysis, and I think I was going to try to provide an example, and I have a blank screen. So, I completely apologize. I sent this over to Joan without including it. When we have it out there online, there will be the sample audience analysis for you to see that has my proposal in there. So, I do apologize. I'm going to go back to this slide to tell you what's included in an audience analysis.

Identify your main audience. And for me, it was for my management, my customer and my staff. This is a group of individuals. And you want to list those out.

Gather information about your audience. What questions will they have? What do I want them to do? What do they need to know? Of course, when you look at all three separate entities of customers or the audience, they are distinctly different. So, they will have different questions and they will do different things, and they will need to know different aspects.

So, you'll want to list major characteristics for each audience. What is their experience with my topic? What is their emotion? What is their social/cultural background? What are their demographics? Anticipate questions your audience might ask.

Also, when you're developing and planning you want to be a detective. You're the reporter. Ask a ton of questions. Who, what, when, why, where and how?

Use people as a resource. Interview co-workers. Rely on experts in the field you are writing about. Find people who have resources about your topic. Talk to customers, clients, stakeholders affected by your topic and eventually you can conduct a focus group. You can meet with a previous owner of the project if available. Get some background from the business area or manager to understand the program or process the current ones or what has been done in the past. People can be invaluable to help make what you write lively, interesting and relevant. Listen to what others have to say about your topic. Everyone has their own perspective on things.

NEXT SLIDE

Just like we organize our closets and pantries at home, we must also organize our writing. So, step 2 is to organize. Use a mind map and brainstorm the points you want to make. Structure from your reader's point-of-view. Chunk-like content. Arrange content in a coherent, logical order one step at a time. Use clear, descriptive headings our readers can scan. Create a timeline of events or processes just so that you can see what progressively goes from one step to the next.

Organization is key to ensure your document flows well and your reader can logically understand what they read. When we have thoughts all over the place and it's often that we just start writing... not really thinking about the organization of our thoughts.

NEXT SLIDE

So, here I talk about using a mind map. In a mind map, you can brainstorm all the points you want to make. Brainstorming involves a list of whatever ideas come to mind about your topic or subject. Good, bad ideas, suggestions, examples, sentences, etc. Think as many as you can. Use your own example, again, during this time.

Mind Mapping is a useful technique that improves the way you take notes and solve problems. By using Mind Maps, you can quickly generate connections around your topic so that your writing is fresh, has depth, and originality. More than this, mind maps encourage creative problem solving, they hold information in a format that your mind finds easy to remember and quick to review.

Mind Maps often use only one side of paper. This helps you to make associations quickly and easily. If you find out more information after you have drawn the main mind map, then you can easily add to it.

So, here's my mind map on my proposal to change Pub Biz. So, there are a few things that are changing, not just the workflow. So, if you see the yellow.... It's "workflow", "duty", "customer service" and "impact stakeholders". That is the major subdivision of my topic or subheading to my proposal. And these labels are identified in my paper. As I thought about the subject and individual facts, I drew additional lines linked from the subheading out. These could be facts like from workflow, simultaneous work. Can in the workload two people are doing the same thing? And the number of days, can the process be shortened? It's 59 days currently right now. Can it be shortened to 30? We have to measure those days. So, you see on the duties I have acronyms CLIP, CAR and MOTR. Those were the different areas within PubBiz that process the work and they do have separate duties.

A complete mind map may have main topic lines radiating in all directions from the center. Sub-topics and facts will branch off these, like branches and twigs from the trunk of a tree. You do not need to worry about what your mind map looks like. Each mind map will look different and this is a visual and this is very powerful.

Once your mind map is complete you can decide what to prioritize, what to put on hold, and what to trash. You'll transcend into the actual writing of your document. This can also be used as your outline and basis for your written communication.

So, an outline, for those of you that are linear, you have your introduction and from your mind map you can take some of those points and that goes into your main point 1; streamline workflow. Main point 2; create new duties. Main point 3; improve customer service. If you had more you can add more, and then you would have a conclusion.

NEXT SLIDE

We also want to structure from our reader's point-of-view. This could be profound to your writing. If you look at the subject from an usual point-of-view, you could always, often brainstorm something that you didn't think about. So, that's always a great way to look at your writing. You'll also want to use clear descriptive headings. Sometimes you just get a chunk of information and block of text. If you use clear, descriptive headings it gives the reader an insight into what's coming next. And so here are some descriptive headings I selected from my paper.

NEXT SLIDE

Step 3 – We're onto the meat and potatoes of your writing. This is the heart of your product. Now, take everything from your mind map, timeline, outline, chunking strategy to develop that introduction. Each part of your mind map is for a purpose. You want to use a strong introduction. You want to be clear, concise,

consistent and complete. You want to use words your audience understands; no technical jargon, no acronyms, no bureaucratic words that only your internal business understands. Be personal and use a positive tone. Use active voice and strong verbs. Ask who does what. Be sure to follow your notes on your mind map. Your introduction will be about the main topic in the middle circle and the ideas you will talk about in your paper. The middle three paragraph will each be a separate branch of ideas. Each paragraph should be a different topic. Your conclusion paragraph should summarize everything you talked about and don't introduce any new ideas in the conclusion. When writing your first draft, remember to write creative, wild and rough.

You also want to cut lengthy paragraphs and unnecessary words. You want to use simple words and short sentences, and you want to be careful of problem words to avoid embarrassing mistakes.

NEXT SLIDE

So, I want to talk to you about the benefits of active voice. The benefits of active voice tells your reader who does what. You sentences are more concise and they will be more clear, and it requires fewer words to express action.

NEXT SLIDE

The active voice is when the subject of the sentence acts upon something or someone. So, for an example, the paper was presented by Dan. I'm sorry, Dan presented the paper is the active voice. And the passive voice is a subject that's active upon rather than the object. The paper was presented by Dan. So, passive voice is powerless. They have static verbs. You can usually recognize passive voice sentences because the verb phrase may include a form of the word to be, to have, or to do. And not all sentences that contain a form of the very to be are in passive voice.

The next one is avoiding unnecessary words. Cut lengthy paragraphs and unnecessary words. You want your reader to read it, right? When you try hard to write an impressive document, it is easy to slip into grandiose words and phrases, which sound significant, but convey nothing but noise. The reader is so engaged with a number syllables, they don't retain the information. Omitting excess words can cut documents significantly. Be diligent in challenging every word you write, and eventually you will learn to write not only clearly, but concisely.

So, in this slide we talk about avoiding unnecessary words. A number of, there's three words in there and you can shorten it down to enough, which is one. If you do this throughout your papers, you would be amazed at how many words you can cut out. So, this is

just a simple sample, but there are a ton. You can go through your paper and just reduce the amount of words.

The next slide is using simple words, short sentences and paragraphs. Have you heard of KISS? KISS stands for Keep It Simple Silly. As much as possible, choose words that are concrete, familiar, short, easy to say and unpretentious. We don't need those \$5,000,000 words. So, in this slide, instead of this, "obtained", try "get"; instead of saying "prior to", say "before." These are simple words. Subsequent,... next. Terminate..., end. And I think utilize and use is a huge one where people are trying to avoid saying utilize. And "via" means "through" or "by." We don't need to use the word via.

Our next slide is avoiding these problem words. If you're going to use these words you better make sure you use them correctly. The validity of your writing will be scrutinized.

NEXT SLIDE

So, there is a plethora of problem words that are out there. I only selected a couple and "affect" versus "effect," it's pretty popular, and it's actually pretty straightforward. The majority of the time you use "affects", with an A, is a verb. And "effect," with an E, was a noun. So, when you should use affect, with an A, means to influence, as in the rain affected Amy's hairdo. Affect can also

mean to act in a way that you don't feel, as in she affected an air of superiority. When you should use effect; effect with an E has a lot of subtle meanings as a noun, but to me the meaning, a result, seems to be the core of all the definitions. For example, you can say the effect was eye-popping or the sound effects were amazing, or the rain had no effect on Amy's hairdo. The second one "its" versus it's-- is its, without the apostrophe is plural, the possessive pronoun form, sorry, the form is used to express that its has a specific quality or that something belong to it. "It's", with the apostrophe, is the contraction of it is. This form is used and sentences using they as the subject of a sentence and the verb to be. Used as either the helping verb it's going to rain or it is raining or the principal verb of the sentence. For an example, it's difficult to find work these days. It's going to rain soon.

I also want to just briefly touch upon "your." "You'r" is the second person possessive adjective used to describe something as belonging to you. "Your" is nearly always followed by a noun. "You're", which is, with the apostrophe is the contraction of you are and often follows the present participle verb from ending in ing. The bottom line is, the confusion is caused because they sound pretty much the same; your and you're. The ironclad rule, no exceptions, is that if you're able to replace the word with "you are," you're saying you are with the apostrophe, otherwise your only choice is your.

So, now after you've had a brief little opportunity to understand the differences, I'm going to do a mini-test on which one to use correctly. The news about Casey Anthony is what we were talking about will probably "affect" everyone. Is it the A or the E? An overwhelming number of you have chose the red, 93% and you are correct because it's pretty straight forward and it is a verb in this case.

Okay, the next one is when you're my age you'll understand. Which one would we use correctly? 99% of you are saying blue when you're my age. Can you replace that with you are? If so, then it is a contraction and you are correct.

NEXT SLIDE

Okay, so now we're onto Step 4, which is providing elements. We did a lot of writing and in there you're going to have a lot of drafts and a lot of re-writes, revisions, having people look at it. The hard part is now over. You've successfully documented and organized your thoughts and ideas, and your paper is starting to take shape. Your next mission is to design it in a manner that is easy to read. Executive level personnel usually never read the entire document. Unfortunately, that is true. They scan the information to glean the text of what's important to their decision-making.

Visual elements are the backbone of your paper and increases the usability and persuasiveness of your communication by highlighting important information. This helps the new readers and establishes the wow factor. You've heard this before; a picture is worth 1,000 words. This certainly is true when you're presenting and explaining data. You can add visual elements to your product to substantiate your research findings, report data, etc... Nothing quite demonstrates what a zebra looks like than a photograph. The trouble is, there are so many different types of charts and graphs to use it's often difficult to decide which one to choose. Selecting the right type starts the good understanding of how each was created. So, we're talking about the elements. Make text easy to scan. White space is good. Use clear, descriptive headings and sub-headings. We showed you some examples before. Avoid fancy fonts and graphics. A lot of people put different types of fonts, you know, it could be Arial, then we switch it up to script and graphic clip art to real images kind of just overloads your reader. Use bullets or numbered lists to separate lengthy text. Use tables and charts. That helps you to identify.

NEXT SLIDE

And adding visual elements to organize and support your ideas. So, adding visual elements, your document should be as reader friendly as possible. And really, you should use the right visual element to display the information so that you're reader can act

alone on that picture or that graph and not really read the text. So, a photograph or drawing is what something looks like. A map indicates where it's located. A diagram shows how to put together. A flow chart, it shows how something works. A graph, how one variable changes in relation to another. A pie chart shows proportions and percentages. A bar chart shows comparisons among quantity. And a table is a body of data, and I've used several tables throughout my presentation. In a structured diagram, the components of a system in how they interrelate.

So, I'm going to show you a few samples. Here is a pie chart that I might add to my paper of the number of forms processed. The colors are kind of similar so I can't really describe them, but the orange is the first quarter. The rust is the second quarter. The grayish brown is the third quarter. And the maroon is the fourth quarter. So, that kind of gives it an opportunity to see it. And you can also add percentages on this so that you could show the reader how much specifically in that timeframe that you're processing. Well, here's a flow chart, and I did include this with my paper on our current flow. And things are numbered so it helps a reader see from one to two to Step 3 to Step 4, where it goes within the flow chart.

Here's a bar chart. I didn't give specific examples, but this gives you an idea of how the information is portrayed visually for your

reader. So, here is my proposal sample and it's just some text broken up and some bullets. I've identified it into a diagram and I used tables and I used headings. Bullets and numbers are a good way to provide your reader the important information. Bullets separate thoughts and ideas. Numbers identify a sequence of action and instructions or steps a reader should take to achieve a call to action. A document that's easy to scan will get read more often than a document with long, dense paragraphs of text. Also, your readers go right directly to that and sometimes they can get the gist of your written communication within those elements.

White space is good. These visual aids not only keep the reader's eye engaged, they can communicate important information much more quickly than text. You can see that right there.

NEXT SLIDE

Step 5 is Review. This is one of the most important steps. If your written communication is important, so is your credibility.

Sloppiness usually doesn't get accolades. Take a break from your writing and re-acquaint yourself after a lengthy time, just getting away from it. Review your work and re-read your writing.

Proofread using the spell checker, but don't rely on it. You probably don't need me to tell you that errors in your document will make you look unprofessional. How many times have you read something that you've read that in emails or on a piece of paper

where they've had a blatant type-o, and it just, all of your attention is on that type-o. It's essential to learn grammar properly and to avoid common mistakes your Spell Checker won't find. Read your writing out loud. You'll get a sense of your tone and your message. Ask a co-worker or someone in your family or maybe that expert about the topic to review it. Revise if necessary.

The enemy of good proofreading is speed and laziness. Many people rush through their documents and just want to be done with it. Before you hand it off to your superior... check for these common errors.

NEXT SLIDE

What types of errors to look for...

- Spelling - Is everything spelled correctly? Don't trust your spell-checker – it won't pick up every mistake. Proofread as many times as necessary. So, we talked about free and fee and form and from. Those are spelled correctly on spell checker, but they might not be the right words in the context.
- Subject/verb agreement – Make sure that data is not data is, but is data are. Data is plural.
- Verb tense consistency – Usually this is found in bullets or there is parallelism. You're using the right very, a strong very with that. So, create, edit, review. Make sure that the sentence start with a verb.
- Point of view consistency – We talked about structuring from your reader's point-of-view. So, if you are talking about your customer you're, in that point-of-view that you're consistent with that

customer and not jumping from management to staff in that point-of-view.

- Mechanical errors – This is basically grammar, punctuation, apostrophes, commas, quotations, those types of errors.
- Word choice – And I think the thesaurus has got us in trouble here where we were encouraged to write a different word, but here at Franchise Tax Board we talk about consistency in word choice. Car, auto, vehicle; those are the same things and in a document you might be talking about those, but you should always use the same word consistently throughout. Since we're talking about a car, it's always a car. If you're talking about an auto, it's always an auto. If you're talking about tax returns, it's always a tax return.
- Word usage and problem words (there, their or they're). Oh, there are a lot of those out there that often get confusing. Know what they mean. Use them correctly.

NEXT SLIDE

- Repeated words or parts of words, especially at the end of one line and beginning of the next... We're all guilty of going into Word and typing in more information and sometimes our brains are quicker than our hands and we type the word two twice or be, b-e twice. So, rightly on one line and then on the second line it's starting again, so look for those.
- Substitutions and omissions, especially those that change the meaning ("form" versus "from" and "fee" versus "free").

- Errors in copying numerical data; transposing numbers. That's huge. You know, 5039 could 5309. It could be detrimental to a taxpayer if their balance due is incorrect.
- Errors in spacing and inconsistencies in formats. So, spacing, you know, we do one space after periods. That we check for consistency in that. Our format, is it left justified? Is it full justified? We're looking at the headers and footers and so forth. And I do, and providing you a handout on a proofreading checklist.

So, in Carmel Middle School, congratulations went out to Micheal Smith. There are actually two spelling errors in here. Can you find them. Congratulations, you're right, is spelled incorrectly. It's missing an l. And the other one is not so readily known, but Michael wouldn't be spelled Micheal. So, the A and the E are swapped. So, although Michael is the spelling bee champ, of course, you put this sign up, it's not.

So, once you finish, your reader should know exactly what you want from them. Like I said before, this process takes time. Do yourself a favor and break that next writing assignment up into manageable pieces. You'll be grateful you did and so will your boss. Now, you have the power to write effectively. We went over a lot of concepts. Practice makes perfect and perfecting your writing skills is essential to your personal and professional growth and development. Share your POWER and begin to write efficiently and effectively.

So, I wanted to go over some resources with you. Read The Gregg Reference Manual, 11th edition, that is our bible. We also use Merriam-Webster's Dictionary. We all have a copy on our desk and also use online forms. You might want to check with your own department writing styles. The Department of Franchise Tax Board has department writing standards, so we encourage, mostly we enforce them. Online resources, Grammar Girl is always great by, I call her filet mignon, Mignon Fogarty, and the Purdue Online Writing Lab is an excellent source as well. Also, PlainLanguage.gov for those of you that are getting interested in plain language I'll add that to my slides as well.

What I did provide to you are some handouts, The 4 C's of Quality Communication, and that is very similar to The Power of Writing, but they're broken out into clear, concise, consistent and complete of where you can be in your writing on those. Also, The Power of Active Voice. That's a handout on how to use active and passive voice when you're writing. I also have the 5 Steps to Power Writing in a one-page document that has basically all of the Power point slides one page. I also made available a list of strong verbs to using your writing. And I provided Quick Tips, which are our department writing standards and a proof-reading checklist. And at this time, I can take any questions Joan.

Moderator/Joan: Well Ann, we have quite a few here. The first one is: speaking of fonts, what fonts are you using on these slides? I really like it.

Presenter/Ann: I believe, I don't know. I think it's Calibri, or however you want to pronounce it.

Moderator/Joan: Also a thing we can do is we can go back to the actual PowerPoint and check it. And if you download the slides you will find the answers there. Okay, and another one... Which are the best fonts and font sizes to use? And let's just say for letters and correspondence.

Presenter/Ann: Letters and correspondence, we generally use the rule of the 12-point font, but sometimes you want to allow enough white space of course. We work with systems. We really try to encourage our writers to put everything on one page, but if it has to go to two pages we're going to break it up. We're not going to make it so tight on that first page. So, we could reduce the font to a 10 to get it on that one page, but we really try to stay with the 12-point font, and we use Arial.

Moderator/Joan: Okay, another question... Should all the tables and charts be in the text portion of the writing or in an appendix?

Presenter/Ann: I always encourage it to be in the text portion of the writing. You want your reader to get the information quickly and it's readily available. Going to an appendix, now, it depends if you have like a one-page proposal and then you have a ton of background information you could do that. But I really, if I'm reading a long document I want the information readily available to me the instant I read it.

Moderator/Joan: Ann, this one says: would you cite your resources, but I think you may have already done that Ann. You did mention a number of good, excellent resources, so I think that's probably covered.

And can we get a copy of the slideshow? Certainly. There's two things you can do. You can download it from the handout icon, which is in the top upper right of your screen. It looks like three little sheets of white paper. Also, the slideshow and the recorder version will all be posted to the Virtual Training Center next week.

And let's see with another one... Can you go over "there" versus "their"?

Presenter/Ann: "There" is over there. It's a place. T-h-e-r-e is a place; it's there. T-h-e-i-r, it's possessive. It is their right, so maybe it's James right... I don't have an example, but t-h-e-i-r is a possessive. It is their copy of the slideshow; meaning the people, their, it's

possessive. T-h-e-i-r. I would like a copy handed to me over there, t-h-e-r-e, it's a place or a location.

Moderator/Joan: Okay thank you.

Presenter/Ann: "They are" is a contraction. So, t-h-e-y-'-r-e is the contraction for they are.

Moderator/Joan: Here's a comment. I did not see the 4 C's of Quality Communication or the quick tips. I think I can answer this one for you Ann. They are in your handouts, so they can be downloaded.

How do I study more about active and passive voice? What resources online could I go to?

Presenter/Ann: There are a ton of resources out there. You can just simply type into Google, active voice or active or passive voice. The Grammar Girl has a great detail about active voice. I do have a handout on active voice. Usually, you want to look for the very to be. VanWrite Training with Linda Vanderwold is excellent. We provide that training to all of our writers in the department. And it's a training of trainers, so we have a trainer that provides that training to employees as they come in and are new to our department as well. So, we require our writers to have VanWrite training.

Moderator/Joan: Okay, I see a couple of questions about handouts, and they will be posted to The Virtual Training Center by next week, so you can find them there. Let's see, oh somebody very nicely, Allen submitted the font is Lucinda Sans Unicode. Thank you Allen very much for finding that answer for us.

And what are the 4 C's of communication?

Presenter/Ann: Clear, concise, consistent and complete. You want to write clear. You want to write concise; so there's omitting unnecessary words, using simple words. So, clear is being very clear on what you're writing about. Concise is using those simple words. Consistent; consistency is really key. Avoid redundancy. Repeating yourself by saying the same thing. We tend to do that. I have a 14 year old daughter and I read her stuff, and I get very frustrated, because I'm like you just said that. And so avoiding redundancy and being consistent with your word choice. So, in the example I provided to you about car, auto, vehicle, be consistent with whatever you choose, you're going to provide that. Also, complete overhaul; give it a complete overhaul. Am I looking at everything? Did proofread it? Did I review it? Did I have someone else review it? Did I read it out loud, backwards, forwards, apply the proofreading techniques, looking at everything.

NEXT SLIDE

On the 4-corners; we do a 4-corner proofreading approach from the left to the right to the bottom and making sure that all of our standards are conducted through the proofreading and applied.

Moderator/Joan: Okay another question, when can formal and informal writing be used?

Presenter/Ann: Formal or informal writing; this is how I perceive it and my staff has even asked questions about this. Informal might be proposals or a recommendation that you might receive via email, and it's not in the formal format of a paper. I think we are really moving toward that as a medium to get action resolved. So, my staff will submit something to me in email and I'm like go for it; move forward. And I really, it's got that formal presentation or in the paper format. Sometimes we have to present an issue paper to upper level management where those words are documented and they have pros and cons and recommendations and options and all those other things where you have really researched everything. And that's a formal document. So, it really depends on who requests you to write something, how they want to... And you should probably be asking them that. How do you want me to present this? Do you want it in a formal way or an informal way?

Moderator/Joan: And another question, when do you use whomever or whoever?

Presenter/Ann: Oh, I have notes on this one. Whom, I don't have it off-hand, and I'm not the grammar guru right now since I'm feeling a little under the weather. Whom is the plural. It's the, I need my grammar, other grammar guru in here. If you go out to the Internet, look up whom versus who; you'll find the answer. I apologize.

Moderator/Joan: A number of questions about the handouts. They will be posted to The Virtual Training Center. Would you say that literary story writing is far different than effective business writing?

Presenter/Ann: Literary story writing is what?

Moderator/Joan: Far different than effective business writing?

Presenter/Ann: Yes.

Moderator/Joan: Say a book or a novel?

Presenter/Ann: Yes, definitely. You're more creative with literary writing. I mean, you can be creative with formal business writing, but the creativeness of your audience, you know, writing for you're, it's different; definitely different. You can be creative. You can have more analogy than descriptive characters, whereas formal writing you want to get right to the point. Novels that engage us have committed the crime of not applying the 5 steps. So, they want to

expand on their writing, but in formal business you want to get right to the point.

Moderator/Joan: Okay do you offer training on persuasive writing?

Presenter/Ann: I do not, but I have trained on writing for the last 5 years and I have a staff of 10. I have kind of passed the torch since I've become a supervisor to my staff to conduct those types of trainings. So, Joan kind of reeled me in. We were working on a project together and she wanted me to provide training, so this is what I've done so far. Two webinars and I'm taking a break for a little bit.

Moderator/Joan: Not for long, we're going to get her back. Persuasive writing sounds fine, so thank you.

Also, we have a comment from Lynn, just a comment. Microsoft Word 2010 has the option to identify passive voice during grammar checks. Check the grammar settings. Thank you very much for that comment.

Presenter/Ann: Yes, tools that are available to you.

Moderator/Joan: Are there other tools to use for technical writing we should know about?

Presenter/Ann: There are so many books out there on technical writing and if you go ask the Internet and just type in whatever your topic might be. PlainLanguage.gov, it's a great resource on technical writing. Web writing, we also provide training on web writing. It's different than business writing, or print or something you provide. You're going to use 50% less words because your reader scans on the web. They want to go right to the information. So, I'll give you an example, your online banking; those navigation bars, all of that is very critical to your reader. They want the information quickly. So, web writing is totally different than a report or evaluation or a proposal.

Moderator/Joan: Okay and Hannah has offered some information. She said, use whom only in places where you would use him. And basically it's the objective case. So, thank you Hannah for adding that. We appreciate that.

Presenter/Ann: Thank you Hannah.

Moderator/Joan: And let's see. Who is the subject in a sentence and whom, oh somebody else offered it. And whom, is the objective. Okay, we've got a lot of people coming in on the who/whom.

And then I thought if you spell out the full name, for example, International Business Machines, you can use the initials "IBM"

throughout the rest of the document. But if I heard you correctly, we should spell it out for the rest of the document, is that correct?

Presenter/Ann: No, you are correct. If you spell it out first, you can use the acronym throughout. Just don't use, I talked about this in my Writing Effective Emails webinar where we used our own internal acronym to describe a project, so on my example I gave you CAR, CLIP and MOTR. Those actually stand for something. CLIP stands for customer liaison intake person. So, that's an internal acronym that my staff know, but someone outside of my business area would not. So, we shouldn't be using those types of acronyms when we are either training or providing education online for our customer, because they wouldn't understand them.

Moderator/Joan: Okay, and one last question. When referencing see table X page X, should table and page be capitalized?

Presenter/Ann: Oh, on the table?

Moderator/Joan: See, it says, you know, like you're referring to something. See table 5, page something. Should the table and page be capitalized?

Presenter/Ann: If the table, probably. It's probably a title of something, because you can refer it to the title. See table and the T should probably be

capitalized, five and the title would be title case as well. So, I would have to see it to visualize it, but I probably would say yes.

Moderator/Joan: Okay, and I had a number of questions again about handouts, and they will be posted to The Virtual Training Center next week. Some people said, well, where is The Virtual Training Center, and if you go to the DPA web site, so that's www.dpa.ca.gov and you look under training the first link will be The Virtual Training Center. We will also add it to the resources when we post this as a recorded version. Okay, Ann, I see we're running out of time.

Presenter/Ann: Okay, so in summary, do you feel we unleashed your power? Okay, so in Step 1 we made a plan. And we talked about all of the things that we were going to prepare ourselves for in writing our paper. And that was knowing your topic, identifying your purpose and goals. Knowing your audience that reporter questions who, what, when, where and why and using people as a resource. In Step 2, we organized our thoughts and put them into a mind map and brainstorm the points we wanted to make. We structured from the readers point-of-view. We chunked like content. We arranged it in a coherent, logical manner. We used clear, descriptive headings and we created the timeline of events. In Step 3, we did all of the writing. This is the hard part. We used a strong introduction. We were clear and concise, consistent and complete. We used words our audience understood. We were personal and

used a positive tone. And we used the active voice and strong verb, and in that we asked who does what. In Step 4, we added pizzazz to our paper. This is the element and that's either tables, graphs, charts, photographs, structured diagrams, and bulleted lists and numbered lists. Step 5, we reviewed it. We took a break from our writing and we used spell and grammar checks. We proofread our work. We read it aloud or we asked someone else to read it. So, there you have it.

Did you unleash your power and do you feel powerful to begin writing that sample that you thought about.

Moderator/Joan: Well, Ann we have one last comment from Stephanie. She said, I don't have a question. I just wanted to say thank you for all the presentation. It was very informative. I'm still in the learning process writing EEO reports... So, that might be a whole other topic for you Ann.

Presenter/Ann: Yeah!

Moderator/Joan: Just a couple of things to summarize. We hope you will visit The Virtual Training Center. Again, on the Department of Personnel Administration web site. And when you go in and look under training, the other thing I would like to suggest that you take a look at are what we call our Leadership Competency Development

Guides. There is one on communication that has some excellent, excellent resources on writing and a sample style guide. If you're department doesn't already have one. And so we hope you will explore all of those resources. And what I'd like you to know is that after this webinar is ended in just about a minute, is you'll be receiving an email and in the email there is going to be attached a survey where you can send your comments on this webinar. But when you do this please be sure to take a look at the confirmation number in the email. You will need to submit it into the survey. So, thank you very much for your time. And Ann, thank you so much. The webinar has now ended.

Presenter/Ann: Thank you! Have a great day!

(End)